



SHARED HOUSING APPLICATION

Shared Housing Loan Application - General Instructions

1. This is the application for Shared Housing Developments in the MHSA Housing Program. Rental Housing Developments in the MHSA Housing Program should use the Rental Housing Universal Application located at www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp or www.calhfa.ca.gov/multifamily/mhsa/index.htm.
2. Applications for the MHSA Housing Program must include all appropriate parts of the MHSA Housing Program Shared Housing Loan Application. To be considered for funding, applications must be on forms provided and approved by CalHFA and DMH. **Application forms may not be modified.** Applicants are responsible for submitting the most recent version of the Application. Additional forms, checklists and draft loan documents are available on the web at www.calhfa.ca.gov/multifamily/mhsa/index.htm.
3. The Application has been prepared in Excel or Word, version 2003. Responses are to be entered into the sections of the Application that are highlighted in yellow.
4. Applicants should refer to the current **MHSA Housing Program Term Sheet** for program requirements. The Term Sheet is available on the web at www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp or www.calhfa.ca.gov/multifamily/mhsa/index.htm.
5. Applicants must comply with local, state, and federal fair housing laws and MHSA Housing Program requirements. Approval of the MHSA Housing Application does not ensure compliance with fair housing laws. The Developer/Borrower is advised to seek legal counsel on fair housing issues. **Attachment A** must be signed by the Developer/Borrower and **Attachment F** must be signed by the County Mental Health Director and submitted with the MHSA Shared Housing Loan application.
6. Applications are accepted over the counter with no deadlines for submission. However, applications will not be accepted until the County Mental Health Department has completed the required 30-Day Local Review Process. Items D1 through D9 must be circulated for local review for 30 days.
7. Counties are responsible for ensuring sufficient MHSA funds have been assigned to CalHFA and are available to fund the loan and subsidy request contained in the application.
8. The **MHSA Shared Housing Index and Checklist (Enclosure 1)** is the organizing document for the application and it must be completed and included as the initial document in the application. If an item on the Checklist is "not applicable" (NA) or "to be submitted" (TBS) at a later date, note this in the far right hand column of the Checklist. For any item that is not applicable, insert a page stating "Not Applicable" following the divider.
9. Shared Housing Developments have the option of submitting a complete application which includes all sections including the Shared Housing Universal Application and all attachments, or alternately they may submit their application in two parts, at two different times.

OPTION 1: A complete application is submitted (Sections A, B, C, D, and all attachments).

or,



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OPTION 2: Step I – Sections C, D, and all attachments are submitted along with a request for the loan and when applicable, a request for an operating subsidy. This step of the application process is subject to the 30 day local review process. CalHFA and DMH will review the submittal and if approved, CalHFA will issue a conditional commitment letter for funding in advance of the site selection. This commitment can cover multiple sites.

Step II – Sections A and B will be submitted to both CalHFA and DMH once the property is selected and is subject to a purchase and sales agreement. Upon receipt of these two sections, CalHFA will underwrite the loan and subsidy request, and once it is approved, move quickly towards a loan closing.

Concurrent with submitting Sections A and B, applicants **must** update the relevant items in Section D based on the selected property. (i.e., Item D.9, Design Considerations: this section can now be completed based on the selected property; Attachment B Shared Housing Funding Request, Attachment G Supportive Services Budget and Budget Narrative, copy of House Rules, etc.).

10. **BINDER ORGANIZATION:** Each application should be submitted in a separate three-ring binder(s) designed for letter-sized paper with a spine sleeve to insert project information. Addressing information is provided in # 11 below.
 - a. Use section divider tabs to divide the binder into four sections, as follows: A, B, C, D.
 - b. Use dividers (colored paper/card stock) to organize the items requested in each of the four sections. Insert completed forms and requested documents following their corresponding divider.
11. Two complete, signed, original Applications must be submitted. One must be sent to DMH and one sent to CalHFA at the addresses listed below.
12. Each original Application should include a CD, DVD, or Flash Drive that contains an electronic version of the complete Application with all required attachments (identified and named accordingly).
13. The shipping boxes in which each application is mailed should be labeled as follows: “MHSA Housing Program Application.” Each box must also show the name and address of the applicant organization. Mail one application to each of the following addresses:

California Department of Mental Health
MHSA Plan Review & Community Program Support
Attention: Donna Ures
1600 9th Street, Room 150
Sacramento, CA 95814

California Housing Finance Agency
Multifamily Programs
Attention: Sheila Felder
100 Corporate Pointe, Suite 250
Culver City, CA 90230



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Disclosure of Application

Information provided in the application will become a public record available for review, by the public, pursuant to the Public Records Act. Any application information and/or materials provided to the Department may be disclosed to any interested person making a public records request. Therefore, applicants should use discretion with information that is not specifically requested, including, but not limited to: personal information, bank account numbers, personal phone numbers, and home addresses. By providing application information to the Department, the applicant is waiving any claim of confidentiality, and hereby, consents to the disclosure of all submitted material which may be requested by interested parties.



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Departmental Contact Information

Policy questions regarding the MHSa Shared Housing Loan Application, Sections A, B and C may be directed to CalHFA's Multifamily Programs Division:

Laura Whittall-Scherfee, Chief
Multifamily Programs
Telephone: (916) 326-8809; Fax: (916) 327-5115
[Email: lwhittall-scherfee@calhfa.ca.gov](mailto:lwhittall-scherfee@calhfa.ca.gov)

Questions regarding prospective and submitted MHSa Shared Housing Applications may be directed to the following persons in CalHFA's Multifamily Programs Division:

Nanette Guevara, Loan Officer
Telephone: (916) 324-9844; Fax: (916) 327-5115
[Email: nguevara@calhfa.ca.gov](mailto:nguevara@calhfa.ca.gov)

Debra Starbuck, Loan Officer
Telephone: (530) 878-8075; Fax: (530) 878-8075
[Email: dstarbuck@calhfa.ca.gov](mailto:dstarbuck@calhfa.ca.gov)

Matt Mielewski, Loan Officer Consultant
Telephone: (310) 342-1262; Fax: (310) 342-1226
[Email: mmielewski@calhfa.ca.gov](mailto:mmielewski@calhfa.ca.gov)

Questions regarding the MHSa Shared Housing Application, Section D, may be directed to DMH's MHSa Plan Review & Community Program Support Section:

Donna Ures
Staff Mental Health Specialist
Telephone: (916) 653-2634; Fax: (916) 653-2634
[Email: donna.ures@dmh.ca.gov](mailto:donna.ures@dmh.ca.gov)

Cynthia Burt, Manager
MHSa Plan Reviews & Community Program Support
Telephone: (916) 654-1188 Fax: (916) 654-6394
[Email: c.burt@dmh.ca.gov](mailto:c.burt@dmh.ca.gov)